



THE ROYAL BRITISH LEGION

GRANTS – GUIDELINES FOR APPLICANTS

About us

The Royal British Legion (TRBL) was formed in 1921 as a caring organisation for people in need from the Service and ex-Service community. We aim to safeguard the welfare, interests and memory of those who have served in the Armed Forces including, under certain circumstances, other support and defence organisations and the Mercantile Marine (beneficiaries).

We can give grants to any ex-Service charity that shares this aim.

We may also give grants to non-ex-Service organisations provided that the grant is used to further one or more of our objectives.

(We give grants to individuals but this is administered separately through our County Officers and is not covered by these guidelines).

About you

- Are you a charitable organisation based in England, Wales, Ireland or the Isle of Man?
- Do you share our aims and objects?
- Can you demonstrate that the money we give you will directly benefit ex-Service people?
- Have you tried but cannot get funding from other sources?
- Can you demonstrate that your organisation is run efficiently?
- Are you a serving unit of the Armed Forces?

If your answer to these questions is YES, then please do contact us. We might be able to help you!

Scope of our grant-giving

We give grants to serving units of the Armed Forces and any charitable organisation in England, Wales, Ireland and the Isle of Man to further one or more of our objects, namely:

- a) to relieve need and to further the education of beneficiaries and their spouses, children and dependants
- b) to relieve need and protect the mental and emotional health of families left by those who have died in service

- c) to relieve suffering, hardship and distress to spouses and dependants caused by the absence of those serving in the Royal Navy, Army and Royal Air Force on Regular, Reserve or Auxiliary engagements and, under certain circumstances, other support and defence organisations and the Mercantile Marine
- d) to promote and support schemes for the resettlement, rehabilitation, retraining and sheltered employment, of beneficiaries and their spouses, children and dependants.

What TRBL grants may cover

Grants may be for:

- projects, for example, a particular time-limited activity that benefits ex-Service personnel
- services, for example, to provide a support or welfare service
- capital, for example, to build a facility or to purchase equipment

The essential requirements are for the applicant organisation to demonstrate that:

- the grant will be for the sole benefit of ex-Service personnel – or ‘beneficiaries’, that is ex-Service people, their spouses, partners, widows, widowers and dependants
- insufficient funds are available from other sources
- they have sound financial and organisation management

What TRBL grants may not cover

We do not make grants for:

- memorials
- commercial ventures, or any potential commercial ventures, for example clubs

Normally TRBL will not give grants for core costs, for example, administration or running costs of an organisation that is supporting ex-Service personnel. However, there may be exceptions to this – TRBL aims to respond flexibly to applications, and is prepared to negotiate if there are special circumstances, for example, if the withholding of grant would harm the interests of ex-Service personnel.

How much do we give?

Grants are awarded at the following levels:

Level 1	up to £25,000
Level 2	£25,000 - £500,000
Level 3	over £500,000

Proportionality

We deal with grants on a proportionality principle – what we expect from you, and how we manage the grant-giving process varies according to the level of grant given. You will be asked to supply more or less information with your application depending on the level of grant you are hoping for. These different requirements are explained in these guidelines, and will also be made clear in the application process.

How we decide whether to give a grant?

We will look at information about you and the reasons for your wanting a grant – we will ask for this information via an application form (see section below **How to apply**).

For Level 1 – up to £25,0000

We will want to check:

- Your fit with our aims and objects
- Specific benefits for and/or evidence of meeting the needs of ex-Service personnel
- That your Audited Accounts for the previous year show both evidence of need for grant, and sound financial management
- The level of your reserves
- That other sources of funding have been explored
- That there are no risks to TRBL whether in terms of mismanagement of funds or of public reputation
- Whether you have previously received a grant from TRBL.

For Level 2 – from £25,000-500,000

This is the same as for Level 1 and additionally:

- Detailed plan and budget for how the grant is to be spent and over what timescale

- Annual Report and Audited Accounts for the current year showing a) evidence of need for grant, b) sound financial management, c) achievement of planned aims and objectives, d) effective management overall
- Your overall current year budget
- Endorsement by independent referee, where the applicant organisation is unknown to TRBL.

For Level 3 – over £500,000

This is the same as for Levels 1 and 2 and additionally:

- Overall current year's budget, last 6 months of management accounts and cash flow forecasts
- Evidence of applicant's track record gained from presentation to the Royal British Legion's Board of Trustees and from visit to applicant by at least one Trustee and one member of the Management Board, and considering:
 - stability of applicant's trustee board and staffing
 - soundness of management infrastructure and systems
 - achievement of business plans over previous 3 years
 - applicant's status in the ex-Service community, and in society generally
 - applicant's awareness of risks and capacity to manage them
- Other sources of funding have been explored, with information on other funders.

How long will it take?

Level 1 grants are normally awarded within two months of receipt of correctly completed application forms.

Level 2 grants are normally awarded within four months of receipt of correctly completed application forms.

Level 3 grants are normally awarded within four to six months of receipt of correctly completed application forms.

We are prepared to make recurrent grants over several years, although three years would be a normal maximum.

How to apply

The first step is to contact us in order to explore whether you may be eligible for a grant, and at what level so that you can be advised further on the detailed requirements. Contact details:

Scarlet Harris
External Grants Officer
The Royal British Legion
Haig House
199 Borough High Street
London SE1 1AA

Telephone: 0203 207 2138

Email: externalgrants@britishlegion.org.uk

You will be sent an application form which will explain the information you need to send us depending on the size of grant you are asking for.

Consistency and transparency

We have a number of longstanding grant-making relationships with certain organisations, and acknowledge the custom and practice that has developed over time. However, we intend to treat all recipients of funds equally, and will be asking all our grant recipients to observe the application and monitoring procedures.

Conditions of grant and monitoring

We give grants subject to certain conditions which are explained to potential applicants at the outset, so that you know what will be expected of you, and the undertakings you must give on receipt of grant. These conditions are in terms of:

- Confirming that the money will be spent as specified in the application
- Presenting accounts to demonstrate the above
- Acknowledging our grant in your Annual Report and other appropriate documents
- Providing an 'end of activity' report describing what was done, who benefited and how, and any learning to inform our future grant-making policy.

These conditions will be more stringent according to the size of the grant.

Monitoring and review

As just described, we seek a monitoring report from all recipients so that we can:

- Understand benefits for the ex-Service community and progress towards our objects
- Check volume of demand and better understand needs
- Check that internal administrative arrangements are efficient and effective
- Monitor expenditure and manage the grant budget effectively, including better forecasting and forward budget planning
- Review and reassess grant-making policy and procedure in the light of experience and lessons learned
- Demonstrate accountability
- Assist decision-making on further applications from the same charity.

There is a monitoring form which all recipients are asked to complete either on completion of the funded activity or annually, whichever comes sooner, and this sets out some standard questions, for example:

- How was the money spent?
- How many people benefited, and who were they?
- What was achieved overall?
- Were there any changes to the planned activity, and how were they dealt with?
- What would you do differently another time?
- What was most helpful/least helpful in how TRBL dealt with the grant?
- What should we do differently in future?

The information given in these monitoring reports is then collated and presented in an Annual Review of Grant-making which is presented to our Board of Trustees. This is part of their continuing review of grant-making practice, policy and procedure in order to check that we are funding the right things in the right way.

Some examples of grants we have made recently

Ex-Services Mental Welfare Society (Combat Stress)

£1.8,000,000 to provide funding for three years to support the establishment of a three Regional Outreach Teams to be sited in England and Wales.

Norcare Ltd

£232,835 towards the Norcare Veterans Centre, to fund the floating support work that provides support for homeless ex-serving members in Newcastle-upon-Tyne.

Regular Forces Employment Association

£180,000 to fund a Job-Finding Service to help those leaving the Armed Forces to find and to remain in employment.

Rugby House-ARP

£59,598 Towards a Senior Practitioner post to work alongside the existing Legion funded Resettlement Worker.

Zimbabwe a National Emergency

£25,000 towards the provision of food parcels for 60 ex-Service personnel and their widows in Zimbabwe for 12 months.

St Petrocks

£20,000 to fund a Project Worker to help support ex-Service personnel who are homeless or vulnerable.

Veterans Aid

£20,000 to pay a Support Worker to help the homeless ex-Service in London.

Music in Hospitals

£9,812 to fund 44 concerts in each of the Royal British Legion Care Homes and Poppy Break Centres

Cookley Playing Field and Village Hall Association

£5,000 towards the new community centre in the area village of Cookley. The Association provides a community centre for the local Legion Branch as well as a sports and social club for the village and surrounding rural community.

